



# Case Management

for Evidence-based Shelter Operations

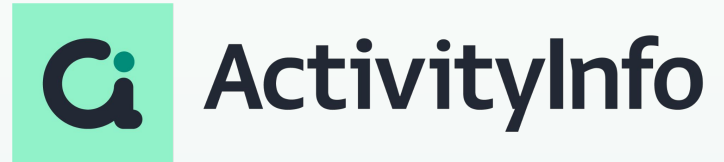
**Starting shortly, please wait!**

# BeDataDriven Mission



Provide the UN and NGOs with a standard, easy-to-use and comprehensive data management platform so that as many organizations as possible can become data-driven to achieve better outcomes for rights holders worldwide.

BeDataDriven pursues this mission by building and helping organizations implement ActivityInfo.

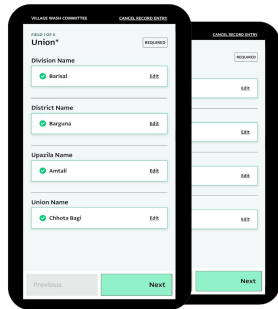


# ActivityInfo

An end-to-end solution for M&E data management

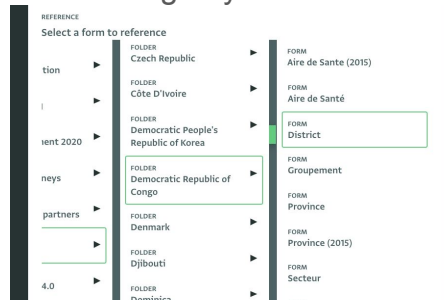
## Data collection

Easily collect the data you need from anywhere



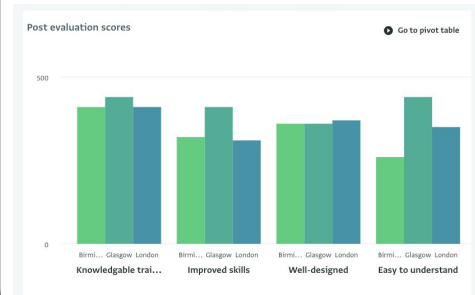
## Data management

Organize your information according to your workflow

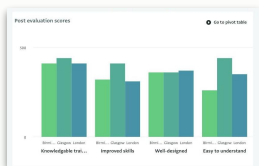


## Data analysis

Generate actionable insights in real-time



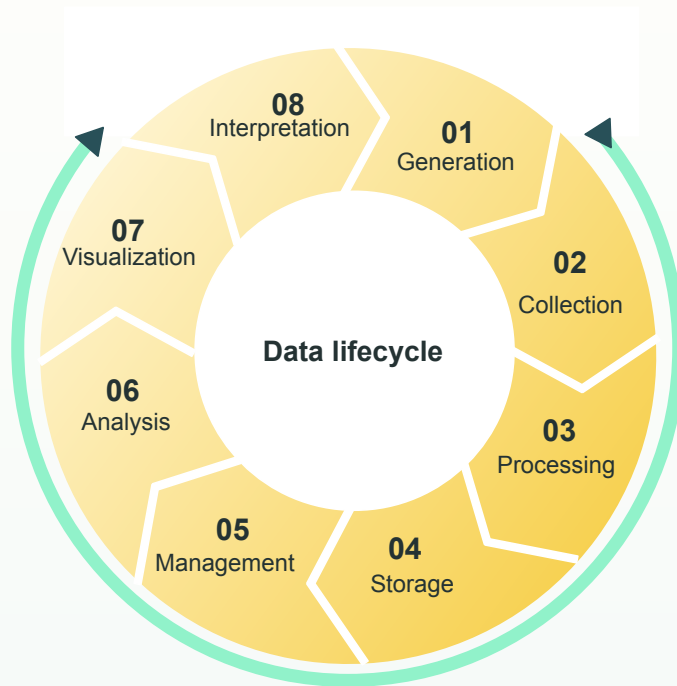
ActivityInfo is your **integrated** solution for managing your data across the data lifecycle.



Logframe 2020

Indicator	Northwest F.O.	Southwest F.O.
Number of families who benefited from WPs	22358	22388
Number of women who benefited from WPs	6347	17828
Number of men who benefited from WPs	6417	17617
Number of GDP rates	16	13
Number of assessments	8	13
Number of activities	27	27

- Reference folder
- Beneficiary outreach
- Inventory of qualitative material
- Post training evaluation survey



Date of reporting

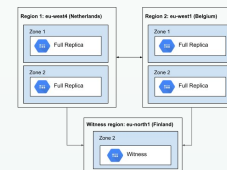
Province

Theme of assistance

# households participating

```

IF(AGE < 18, 5, 0)
+ IF(AGE > 65, 3, 0)
  IF(GENDER.Female, 5, 0)
  + IF(DISABLED.Temporarily, 3, 0)
  + IF(DISABLED.Permanently, 5, 0)
  + IF(INV.CHILDREN > 10, 10, 0)
    
```



**ActivityInfo**

# ActivityInfo Users



Aga Khan Agency for Habitat



# Meet your instructor

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**Eliza Avgeropoulou**

Senior Monitoring and Evaluation Implementation

Specialist

BeDataDriven

# Agenda

## Setting the scene

- Introduction to types of shelter operations
- Monitoring and evaluation framework for shelter operations

## From theory to implementation

- Moving from the monitoring and evaluation framework to information management system design
- How can an information management system (IMS) support the implementation of shelter operations? A case study example using ActivityInfo



Setting the scene

# Time for a short poll!

# The need

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“Shelter is far more than a roof and four walls.”

Humanitarian Shelter  
and Settlements Guidelines (2017)

“People consider shelter  
their most important asset or their highest living cost.”

‘International Encyclopaedia of Housing and Home’,  
S.J.Smith. San Diego,  
Elsevier (Gilbert 2012)

# The need

More than 1.12 billion people live in slums or informal settlements. An additional 300 million face absolute homelessness, lacking any form of stable shelter.

[UN searches for solutions to global housing crisis](#)



UNICEF/ZhanTU Chakma Slums in Dhaka, the capital city of Bangladesh, with high rises behind.

# Response definition

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A **shelter** is a basic physiological need. It is a physical structure or place that provides protection from the environment.

A **settlement** is a socially and geographically defined area (like a neighborhood, village, or camp) where people live.

## A **settlement approach**:

- ❑ Targets a **specific** geographic area of high need.
- ❑ Is **multisectoral** (integrates water, health, protection, and livelihoods).
- ❑ Engages with the **whole population** (displaced people and the host community).
- ❑ Works with **local stakeholders** (local governments, community leaders, and local businesses).

# Types of shelter operations



## Emergency

Tents

Collective centers

## Transitional

Rental support

Self-help repair

## Permanent

Long-term lease

Policy integration

# World examples

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## Emergency

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### Philippines: Facilitating self-recovery (post-typhoon Haiyan)

- Remote, disadvantaged coastal areas
- Emergency items (tents/tarps) to a "support" approach for permanent repairs.
- Interventions were area-based.

## Transitional

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### Lebanon: Host community shelter programme

- NRC provided financial assistance to the landlords to complete or upgrade these properties to a basic habitable condition.
- The property owner agreed to host a vulnerable refugee family rent-free for a period of 12 months.

## Permanent

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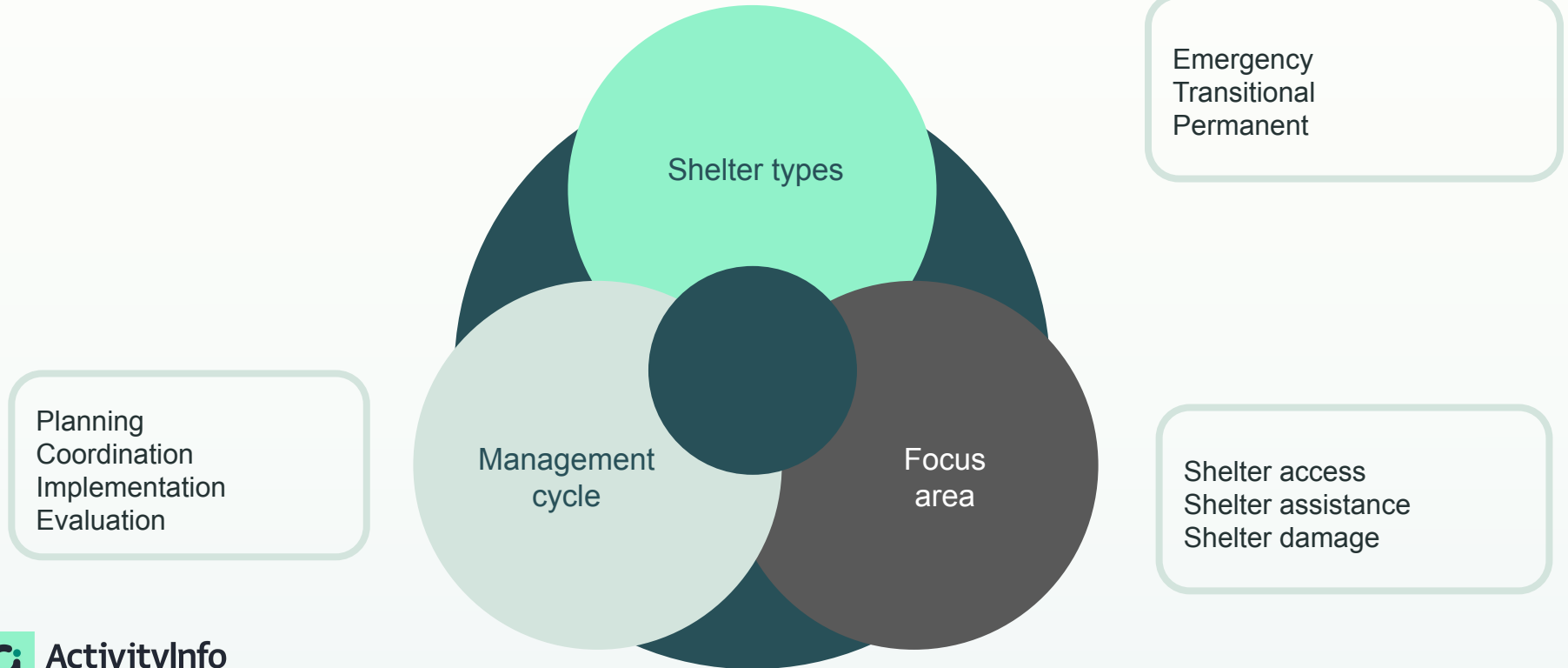
### Glasgow: Integrating housing first into policy

- Individuals with complex needs.
- Ability to mobilise public housing and foster strong partnerships with social landlords.

# Monitoring and evaluation framework



# Indicator categories



# Types of shelter operations: Examples

Emergency

M&E is "acute," focusing on immediate survival, speed of delivery, and coverage.

**Example:** % of the targeted population receiving basic shelter kits or tents.

Transitional

Focuses on tracking how families move toward recovery and how settlements function.

**Example:** Covered floor area per person (standard: minimum 3.5 sqm per person).

Permanent

Focuses on long-term safety, building code compliance, and structural integrity.

**Example:** % of shelters constructed according to local building codes and standards.

# Focus area: Examples

## Access

Identify current access and needs in terms of settlement or shelter by communities/households/individuals.

**Example:** % of targeted households living in adequate shelters meeting shelter standards defined by the cluster.

## Assistance

Shelter assistance and provision.

**Example:** % of households in need of shelter assistance receiving shelter support.

## Damage

Damaged and/or destroyed shelter per type of construction.

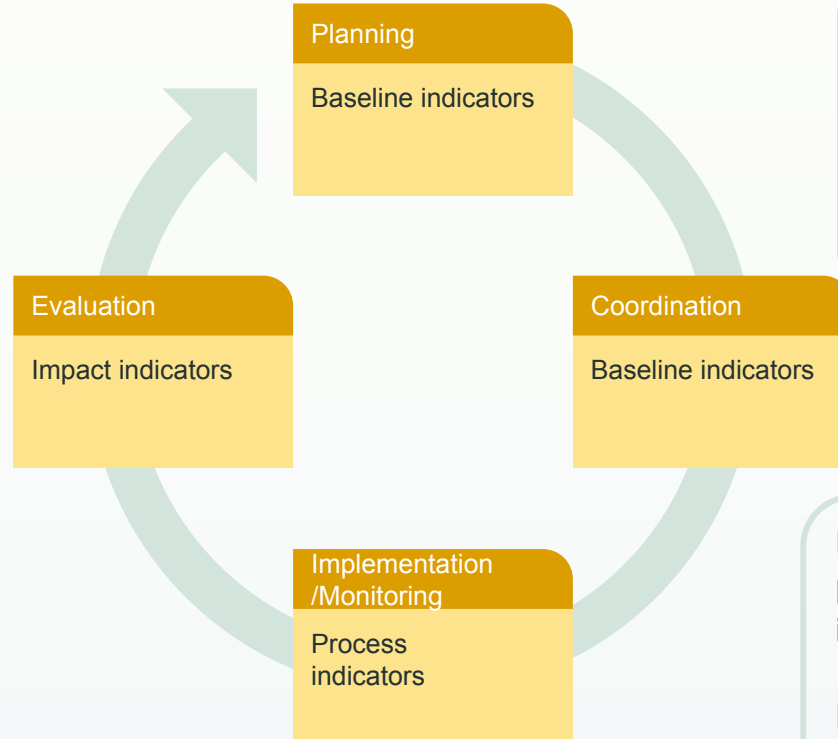
**Example:** % of houses/dwellings uninhabitable as a consequence of [event].

Combined with NFI assistance, WASH etc  
**Example:** % of targeted population receiving NFI kits

# Results-based management cycle: Examples

Measure the **impact**.

**Example:** % of beneficiary households satisfied/unsatisfied with shelter solution.



Understand the **context** and determine the broad scope of the **needs**.

**Example:** % of households in affected areas indicating shelter as a priority need.

Monitoring and reporting on the **progress** of an action in terms of its outputs and outcomes.

**Example:** Number of shelter toolkits provided.

# Case management process



Assessment/  
mapping

E.g. Needs,  
market, mapping



Registration &  
Assessment

Beneficiary/House  
hold level &&  
vulnerability



Shelter  
monitoring

E.g. Construction,  
units assessment



Support

E.g. Financial,  
material, leases



Exit

Evaluation and  
handover



From theory to implementation

# Information management system (IMS)

## Information production

Collect

Data

Organize

Process

Information

## Information consumption

Use

Decision

Roles Implementation

Analysis implementation

Learning through dissemination

# Inspired by Small Shelter Unit (SSU) rehabilitation project

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## The case study

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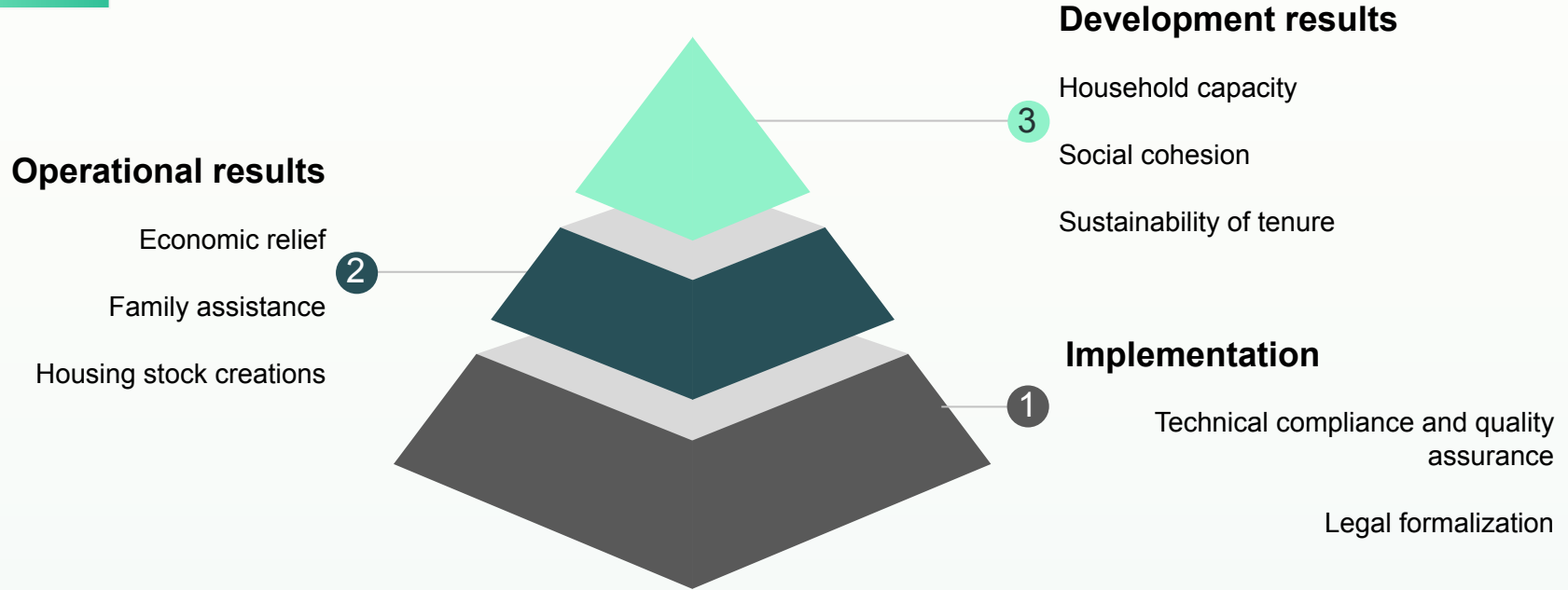
Upgrading of unfinished or substandard buildings to provide safe affordable housing for refugees and vulnerable Lebanese.

- **Agreements:** Legal agreements are signed between the landlord, beneficiaries, and the implementing agency.
- **Rent Reduction:** Works are repaid by the owner through reduced rent for the tenants.
- **Rehabilitation:** Focuses on improving the existing infrastructure to avoid legal complications, particularly with Lebanese authorities, and to prevent rent inflation.
- **WASH & Weatherproofing:** Often includes quick repairs to roofs, walls, and WASH facilities before winter or during emergency phases.



[NRC shelter programme in Lebanon](#)

# Monitoring and evaluation framework



# Which is the starting point?

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1

## Decision

**Why** do we need an IMS?

**Who** will take the lead?

2

## Collaboration

**How** will we collaborate?

**Who** is doing **what**?

3

## Data model

**How** do we organize the data?

4

## Launch && Adopt

**What** is the capacity needed to launch and adopt the IMS?

A platform that satisfies needs and is adaptable to changing environments

# The decision

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- Who are the stakeholders involved?
- What decisions do we need to make together?
- What information is needed to make these decisions?
- Who needs to be consulted during this decision-making process?



# Coordination

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- What is the process and timeline needed to achieve the goal?
- Which entities are responsible for each step of the process?
- Which entities need to be consulted?
- What are the risks and the mitigation measures?



# Coordination: How can we work together?

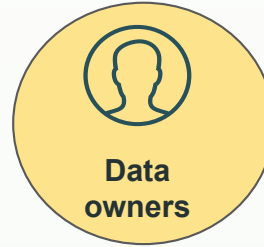
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Strategic direction



Setting policies



Main  
decision-maker  
about the data



Handles technical  
aspects of data  
management

**Decision: Coordination & unified donor reporting**

# Coordination: How can we implement together?

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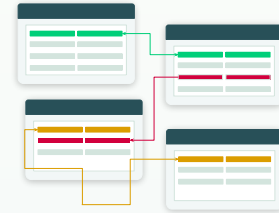
- Separate permissions for Create, Read, Update, Delete
- Role-based access control
- Flexible permission levels (resource, record, field)

# Data model

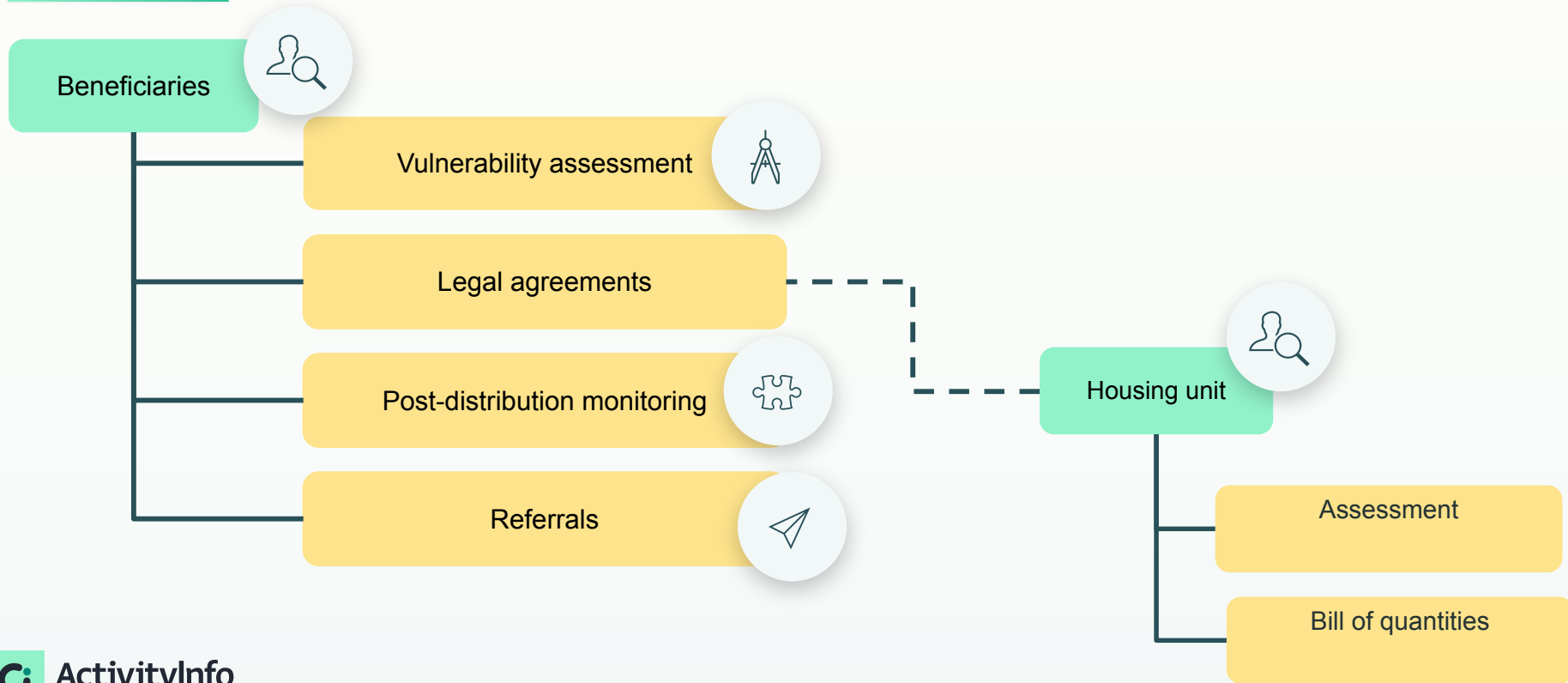
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**Which data are needed to inform decision-making? How do we use the data?**

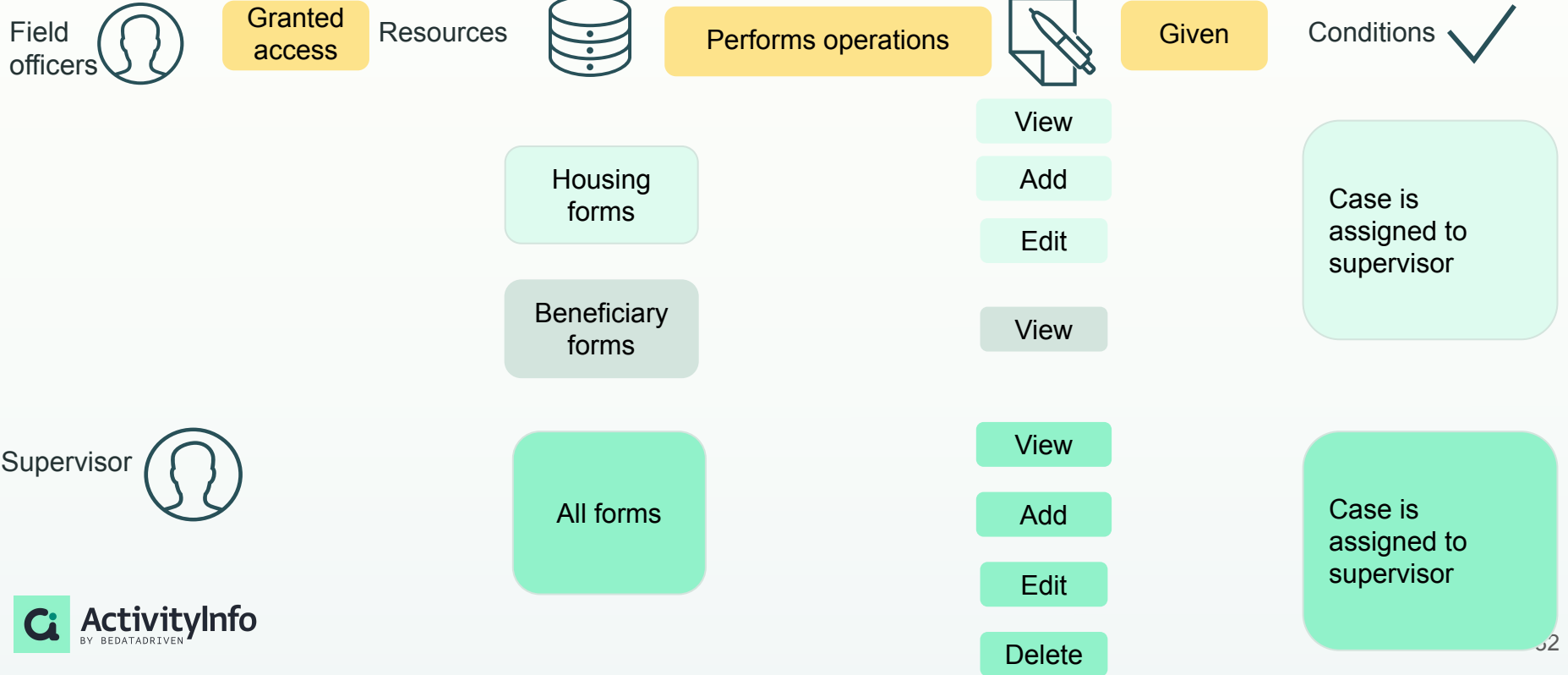
- What are the data needs?
- How are the data needs grouped in different data sets?
- What are the relationships?
- What is the data collection and review process?
- How will data be collected?



# Case study: Data model



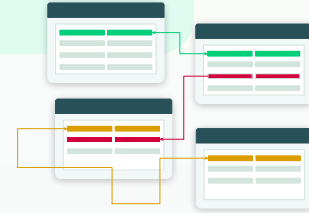
# Case study: Coordination



# Let's explore...



Let's explore the database.



# Case study: Data use

## Data access

Daily

**Audience:** Supervisors

**Content:** Specific data points that are associated with different data collection forms.

**Dissemination:** Create dedicated view

## Report

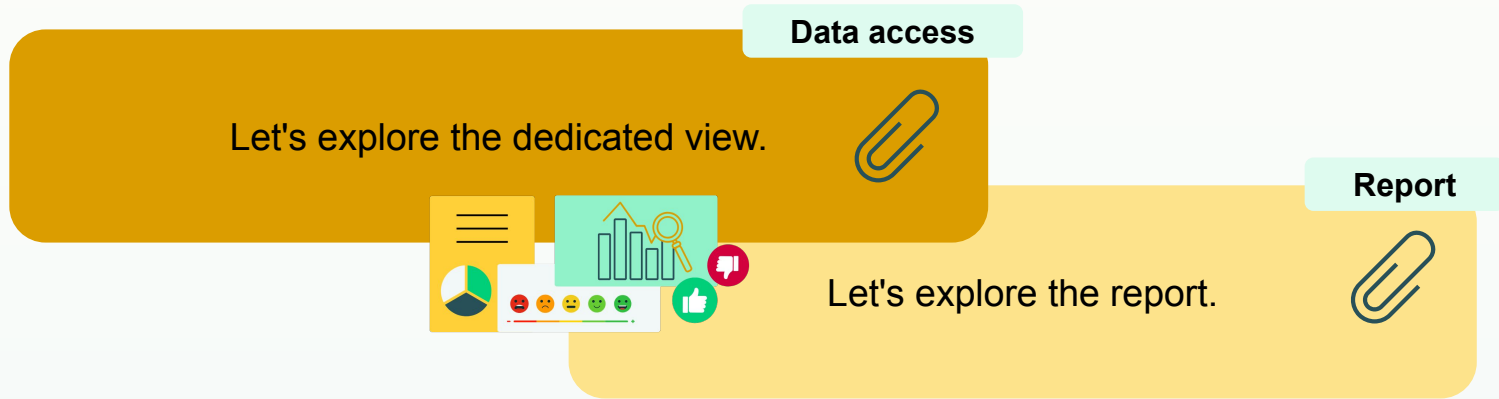
Monthly

**Audience:** Project manager

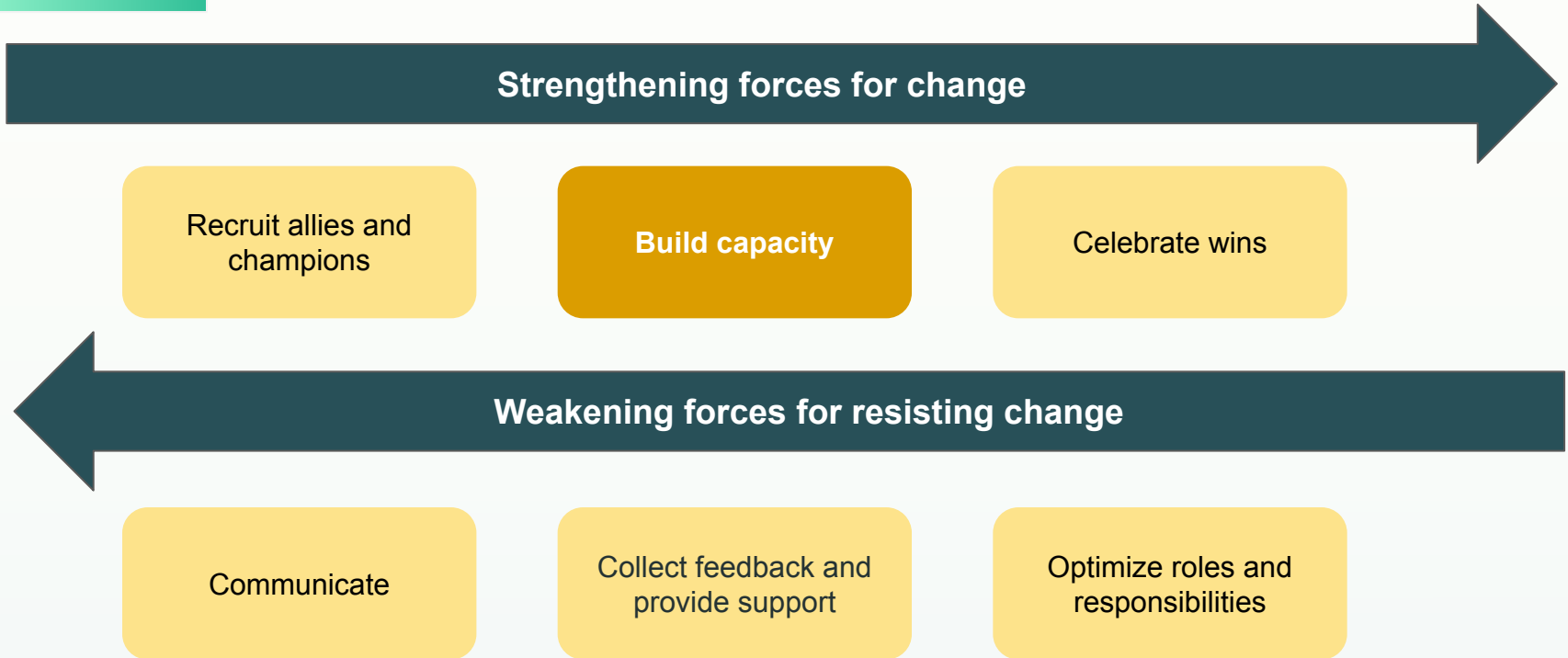
**Content:** Post-distribution survey results & descriptive statistics on monthly basis.

**Dissemination:** Create a report in ActivityInfo

# Let's explore...

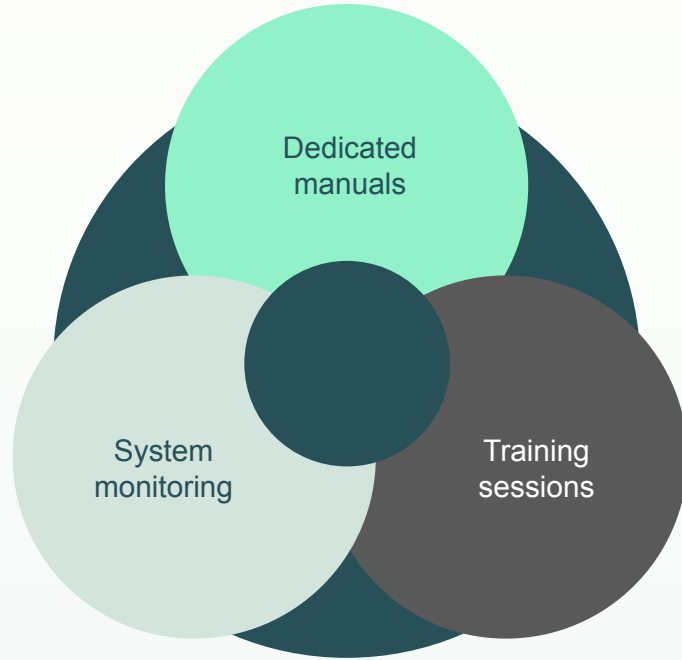


# Best practices for launch and adoption



# Build capacity

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- Who needs to be trained?
- What type of resources do we need following the training?
- What type of support? Who supports?

# Tip: Training sessions

## Prior to training

**Who** needs to do **what** differently? **Why**?

## During training

Tailor the training content to align with the learning needs:

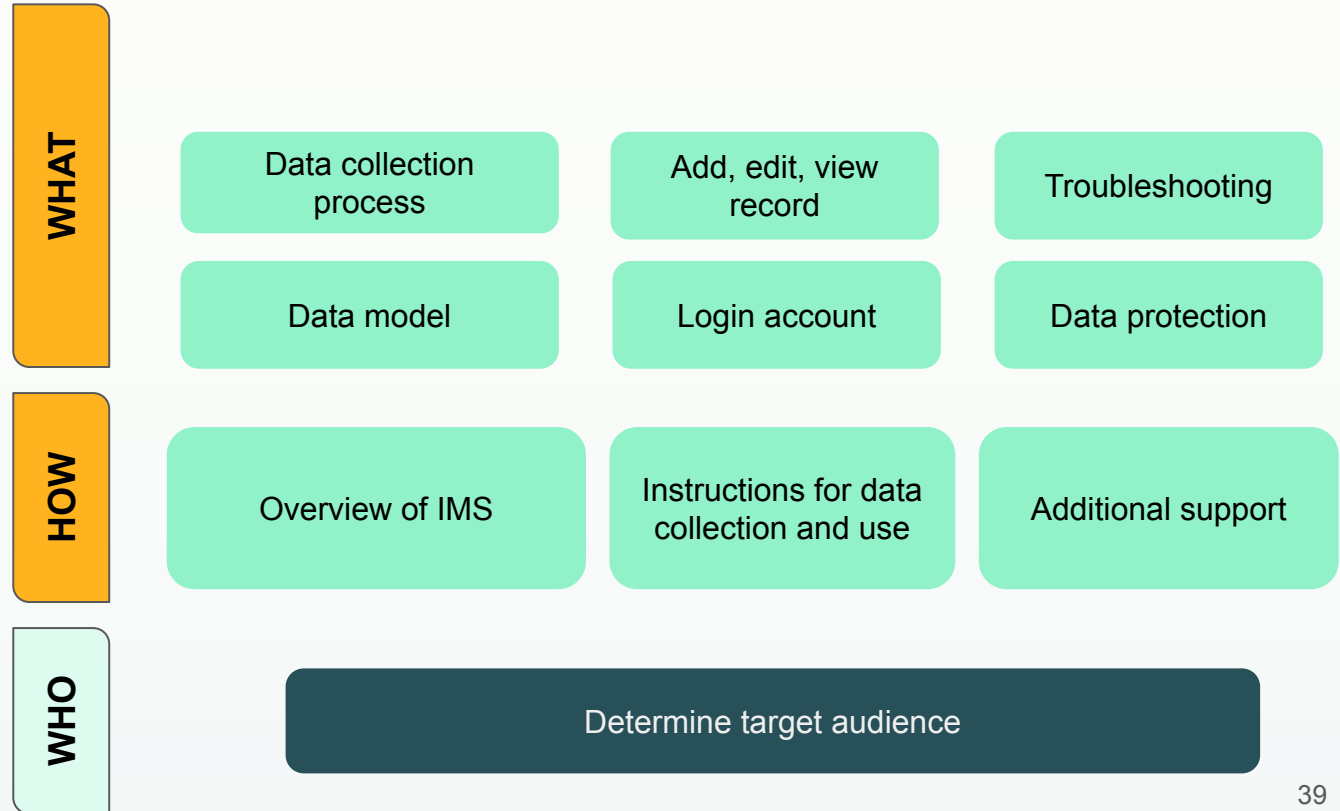
- Design a training outline or draft schedule that identifies objectives for each session.
- Design a detailed facilitation guide that fleshes out the methods and supporting documents for each session.

## Following training

Feedback and Evaluation:  
Regularly seek feedback from participants.

Recognize that training is an ongoing process. Offer refresher courses, and advanced training.

# Tip: Dedicated manual



# Key takeaways



- Shelter is defined as more than just a physical roof; it is often a person's most important asset and highest living cost. The monitoring and evaluation framework should correspond to the intervention type: emergency, transitional, permanent.
- To move from theory to implementation, organizations must build a robust Information Management System. The key steps include: the goal definition, the terms of collaboration, the data organization and the capacity building approach needed to launch and adopt.
- A successful IMS relies on the people using it. Thus, a dedicated training approach is needed for each project in each organization.

# Resources

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- [Humanitarian Shelter and Settlements Guidelines](#)
- [Settlements Approach Guidance Note: Where boundaries and action merge](#)
- [UN-HABITAT EVALUATION MANUAL](#)
- [Urban Monitoring Framework](#)
- [NRC evaluation report](#)
- [INFORMATION MANAGEMENT & ASSESSMENT TOOLKIT 2021](#)
- [Vanuatu Household and Building Damage Assessment](#)
- [VASyR 2023: Vulnerability Assessment of Syrian Refugees in Lebanon](#)

# Questions?

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